

April 2015
RFP 113688

**PURCHASING DEPARTMENT
101 EAST 11th STREET, STE. G-13
CHATTANOOGA, TENNESSEE 37402**

Request for Proposals for the City of Chattanooga, TN

Requisition No.: RFP – 113688
Ordering Dept.: Information Technology Department
Buyer: Sharon Lea / lea_sharon@chattanooga.gov
Phone No.: 423 643-7235
Fax No.: 423 643-7244

**Request for Proposals for Citizen Relationship Management (CRM)
Software Solution for Chattanooga 311 Call Center**

*****REQUEST FOR PROPOSALS MUST BE RECEIVED*****

NO LATER THAN

4:00 PM E.S.T. on Friday, May 29th, 2015

*****ALL QUESTIONS MUST BE SUBMITTED IN WRITING****

NO LATER THAN

4:30 PM E.S.T. on Tuesday, May 19th, 2015

The City of Chattanooga reserves the right to reject any and/or all proposals, waive any informalities in the proposals received, and to accept any proposal which in its opinion may be for the best interest of the City.

The City of Chattanooga will be non-discriminatory in the purchase of all goods and services on the basis of race, color or national origin.

The City of Chattanooga (COC) Terms and Conditions posted on Website are applicable:

<http://www.chattanooga.gov/purchasing/standard-terms-and-conditions>

NOTE: ALL PROPOSALS MUST BE SIGNED.

All proposals received are subject to the terms and conditions contained herein and as listed in the above referenced website. The undersigned Offeror acknowledges having received, reviewed, and agrees to be bound to these terms and conditions, unless specific written exceptions are otherwise stated.

PLEASE PROVIDE US WITH THE FOLLOWING

Company Name: _____

Mailing Address: _____

City & Zip Code: _____

Phone/Toll-Free No.: _____

Fax No.: _____

E-Mail Address: _____

Contact Person: _____

Signature: _____

City Of Chattanooga, Tennessee
Department of Information Technology



Request for Proposal 113688

Chattanooga 311 Call Center
Citizen Relationship Management (CRM) Software Solution

This request solicits proposals to furnish the municipal government of Chattanooga, Tennessee with a Citizen Relationship Management software solution.

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SECTION I - GENERAL INFORMATION

Introduction

The purpose of this section is to define the scope of the project and describe this Request for Proposal (RFP).

Purpose of RFP

This request solicits proposals to furnish the municipal government of Chattanooga, herein after referred to as “The City”, with a Citizen Relationship Management software solution, herein after referred to as “CRM software solution.” Specifications describing the functional and technical requirements of the CRM software solution can be found in Section IV of this document. It is The City’s intent to select the most suitable solution based on responses to this RFP.

This request solicits proposals with recommendations in five areas:

- (1) CRM software solution
- (2) Implementation services for recommended solution
- (3) Hardware and hosting services
- (4) Migration of legacy CRM data
- (5) Replacement of software interfaces with The City’s current departmental work management software solutions (Cityview & Cityworks)

SECTION II – ADMINISTRATIVE AND CONTRACTUAL INFORMATION

Introduction

The purpose of this section is to identify the administrative requirements related to this RFP.

Inquiries

Questions concerning this RFP may be sent by fax or e-mail no later than 4:30 pm EST on Tuesday, May 19th, 2015 to the attention of:

Sharon Lea, Buyer
City of Chattanooga
Purchasing Department
101 E. 11th Street, Ste. G13
Chattanooga, TN 37402
Fax: (423) 643-7244
Email: Lea_Sharon@chattanooga.gov

Exceptions to RFP Specifications

This RFP is intended to describe The City's minimum requirements and response format in sufficient detail to secure comparable proposals. However, vendors are not precluded from submitting proposals that recommend a solution that differs from the provided specifications as long as the required response format is followed. Any exceptions to specifications should be clearly noted and will be considered as they apply to the overall interest of The City.

Implied Requirements

All products and services not specifically mentioned in this RFP, but which are necessary to provide the full recommended solution described by the vendor, must be included in the proposal.

Vendor-Supplied Materials

Any material submitted by a vendor shall become the property of The City unless otherwise requested at the time of submission. Any material considered confidential in nature must be so marked.

Issuing Office

This RFP shall be governed by the laws of the State of Tennessee and is issued by the Purchasing Department for The City.

Rejection of Proposals

The City reserves the right to reject any and all proposals resulting from this RFP.

Incurring Costs

The City is not liable for any cost incurred by vendors prior to the issuance of a purchase agreement for the proposed CRM software solution and will not pay for information solicited or obtained.

Vendor Proposals

Vendors must submit a response to this RFP with a printed original response along with one additional copy and an electronic copy. The electronic format must be MS Word or PDF. The vendor proposal must follow the format as defined in Section II of this document.

Economy of Preparation

Proposals must be prepared simply and economically. They should provide a straightforward and concise description of the CRM software solution proposed. Colorful bindings, displays, promotional materials, etc. are not desired. Emphasis should be placed on clarity and content. Lengthy proposals may be viewed as attempts to obfuscate issues and may be rejected.

Conditions of Agreement

The successful vendor will be expected to enter into contract negotiations with The City that will result in a formal purchase agreement between the parties.

SECTION III – RFP LIFE CYCLE

Introduction

The purpose of this section is to inform prospective vendors of the process that will take place as a result of this RFP. The information contained herein discloses all details about dates, times, and places as they pertain to this RFP.

Response Date

Sealed proposals to be considered must arrive at the issuing office on or before the time and date referred to on the cover sheet of this document.

Initial Screening

The initial screening of submitted proposals will occur as soon as practical following the opening. The initial screening process will involve evaluating all proposals for completeness, clarity, and conformity to all RFP requirements. Proposals not meeting minimum requirements will not receive further consideration.

Oral Presentation

Vendors submitting a proposal that passes initial screening may be invited to make an oral presentation of their proposal to The City. Invitations will be given solely at the initiative of The City for such purposes as The City deems necessary. Such presentations provide an opportunity for the vendor to clarify their proposal and ensure that a thorough, mutual understanding exists. Oral presentations are not mandatory. These presentations may be conducted in person, by WebEx or teleconference.

Product Demonstration

Vendors may be requested by The City to demonstrate the CRM software solution they are proposing. Demonstrations will be conducted in the most economical manner possible.

Final Evaluation

After all requested oral presentations and product demonstrations have been completed, the final evaluation will begin. In the final evaluation, the proposals submitted by the vendors will be reviewed and a recommendation will be made by an evaluation committee for the proposal that is considered to best satisfy The City's requirements.

Any recommendation by the evaluation team or staff members is subject to review and concurrence or non-concurrence by the Mayor's Office. The Mayor's Office will then make a recommendation to Chattanooga City Council who will make the final decision based upon whatever factors it considers pertinent.

Proposal Acceptance

After the final evaluation, the chosen vendor(s) will be notified and contract discussion and negotiation between The City and the selected vendor(s) will begin. The content of this RFP and the successful vendor's proposal will become an integral part of the contract, but may be modified by provision of the contract. Vendors are requested to submit current contract forms with their proposal for review by The City.

Section IV – Requirements for the Proposed System

Introduction

The purpose of this section is to describe the required and desired features of a CRM software solution for The City. The vendor may propose additional features and options to be considered. The sequence in which the following items appear in this document does not represent any priority of importance for this proposal. The City requests that prospective vendors use these specifications to develop proposals within the guidelines set forth in Section II.

General Requirements

The City's 311 Call Center has been in operation since 2002 serving a city population of approximately 175,000 and a region of approximately 400,000. The Call Center operates from 8:00 am to 6:00 pm with a staff of 12 Citizen Service Representatives and a Call Center Supervisor. The City's 311 Call Center received approximately 330,000 calls in 2014 which resulted in approximately 85,000 requests for service. With this RFP, The City is seeking an upgrade or replacement for the Motorola CSR software solution that was implemented by The City in 2002. The goal of this project is to improve service to the citizens of Chattanooga as well as the internal departments served by 311.

For cost comparison purposes, the prospective vendor must include an itemized cost schedule in their response along with all maintenance, subscription and support costs based on information provided in this RFP. The potential vendor will also be required to provide a single project manager for all proposed project phases.

The successful vendor can expect to perform discovery sessions once the project begins in order fully understand The City's operating environment and specific needs with regard to implementation of a CRM software solution.

Vendor Information

Prospective vendors should provide the following information pertaining to their organization and this project:

- Size of the organization
- Public financial records from the past two years
- Client list including those using products recommended by the prospective vendor
- Number of years in business providing similar applications
- Number of support personnel in the organization
- Frequency of software updates (if applicable)
- A reference list including clients who have used the vendor's services
- A list of all government clients who have used the vendor's services
- A firm timeline for implementation
- A project start date commitment
- A resource availability date commitment
- Complete references for the prospective vendor's Project Manager for this project
- A sample project plan
- Detailed information on prospective vendor's "discovery" methodology

Prospective vendors, regardless of previous experience with municipal government Call Center CRM software solutions, should demonstrate a thorough knowledge of the differences associated with municipal government Call Centers as opposed to those of the private sector with regard to all phases of call receipt, tracking, and processing.

Prospective vendors should understand that adherence to all vendor-proposed dates and timelines will become part of said vendor's contractual obligation should their proposal be selected by The City for its CRM software solution.

Training

Proposals must include all required training of end user and support personnel required for the implementation and use of any proposed CRM software solution. The vendor is expected to be familiar with any software included within or recommended in the proposal.

Technical Support Services

Proposals must include all costs for legacy data migration, custom development of application interfaces, and any other software development that is required to implement and host the proposed solution.

Cost Summary

Vendor must supply a line item detail to support Proposal Cost Summary in Appendix A.

Functional Requirements

The 311 Call Center is a one-call citizen service line. Citizens call 311 for non-emergencies that do not involve a crime in progress or an immediate threat to life, bodily injury, or major property damage or loss.

The CRM software solution should support The City's centralized 311 Call Center by facilitating the input of non-emergency service requests across platforms, including: voice, email, internet, mobile devices and walk-ins as well as enable subsequent follow-up communication with citizens. The City's centralized call center staff members rely on computerized tracking of service requests from the initial call through its transmission to the receiving department, assignment and completion of the service request, and request close-out to provide prompt, friendly responses to citizens' requests for service or information.

A key functional component of information transfer is the automated progress tracking of a service requests. This status should be reflected accurately in all relevant systems in a real-time and dynamic fashion.

The CRM software solution must allow for request entry by other city departments that process citizen requests.

Specific functional requirements include:

1. Record all service request details in a centralized database application.
2. Functionality should intuitively select the appropriate department that would best resolve a request based on its type or category.
3. Solution should allow for completion of flex questions associated with particular service requests.
4. Solution should validate the service location as an accurate City of Chattanooga street address.

The address data to be sourced directly from Hamilton County's ESRI SDE or a version of the SDE

managed by The City. Address updates should be automatically reflected in the recommended software solution.

5. Solution should reject any request for service that falls outside the City of Chattanooga limits and automatically alert the requestor as to the reason for the rejection.
6. Track requests for information which do not result in departmental service requests.
7. The ability for citizen/agency requestors to submit requests in bulk.
8. Easily retrieved or viewable status and resolution details of service requests for 311 Operators or citizens.
9. The ability to attach files to service requests.
10. Communication to citizen requestors confirming the request submission, closing out the request, and providing a means for survey or evaluation by the citizen.
11. Maintain a customer service knowledge base to provide 311 call center agents with an online reference and policy library to ensure consistency of information.
12. Provide a variety of statistical reports upon request for City administrators. Reports should have the option to be viewed by geographical area, department hierarchy, type of request, request method (i.e. phone, email, web, walk-in, etc.) and other common data points.
13. Provide a consistent data interface with other existing service request and work order software used in various departments in The City.
 - a. Meet current functionality or improve interface solutions already in operation. Currently existing interfaces create both inbound and outbound transfers including: Azteca Cityworks for the Public Works Department and Municipal Software Cityview for the Neighborhood Services Department.
 - b. Provide continued support for each interface provided.
 - c. Provide ability for additional interfaces for other software applications if needed in the future.
14. Provide the customer service knowledge base as a searchable Web-based self-service portal to help citizens answer their own questions and find the status of their requests.
15. Provide citizens with the ability to report problems and the geographical location directly from mobile devices.
16. Provide citizens with a web-based self-service retrieval of historical service request and status information based on geographical location without compromising the identity of the original requestors.

17. Notify selected personnel when requests become overdue or have incomplete follow-up within specified time frame.
18. Other features and functions found in “best of class” call center services.

Technical Requirements

All proposed software configurations should reference a standard production release of the recommended software solution as of the vendor response date. The City desires to implement a hosted and managed solution that meets a minimum up time and performance standard to be contractually agreed upon.

Telephony integration

The 311 Call Center currently operates on an Avaya IP telephony network. Potential vendor solutions must be compliant with Avaya solutions.

Client workstations attached to the network will be running Windows 8.

All associated hardware should be available from popular vendors and require no specialized configuration or additions to run the proposed application. The City reserves the right to purchase all recommended computing hardware and associated licensing or installation independent of this RFP.

The City prefers a hosted solution supported by the vendor.

Appendix A

Proposal Cost Summary Form

The undersigned, being familiar with the requirements of The City of Chattanooga Request for Proposal for a CRM software solution, proposes to furnish products and services to The City in accordance with that request.

The summary below reflects projected City costs for the solution acquisition and implementation. Supporting detail must be attached describing hourly rates, projected expenses, software and hardware expenses, annual support and maintenance, discounts along with any other detail that will lead to a clear understanding of the proposal.

Item	Cost
Software Licensing	
Consulting Services	
Technical Support Services	
Training Services	
Annual Maintenance and Support	
Other Costs (Describe)	
Total	

Appendix B

Affirmative Action Plan

Affirmative Action Plan

For

(RFP No. 113688)

(Name of Contractor)

The above named Contractor is an equal opportunity employer and during the performance of this contract, the Contractor agrees to abide by the Affirmative Action Plan of the City of Chattanooga as follows:

The Contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, national origin, or handicap. The Contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, national origin, or handicap. Such action shall include, but not be limited to, the following: employment, upgrading, demotion, or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay, or other forms of compensation, and selection for training, including apprenticeship. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

The Contractor will, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, or national origin, or handicap.

The Contractor will send to each labor union or representative of workers with which he/she has a collective bargaining agreement or other contract or understanding, a notice advising the said labor union or workers' representatives of the Contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

During the term of this contract the following non-discriminatory hiring practices shall be employed to provide employment opportunities for minorities and women:

All help wanted ads placed in newspapers or other publications shall contain the phrase "Equal Employment Opportunity Employer".

Seek and maintain contracts with minority groups and human relations organizations as available.

Encourage present employees to refer qualified minority group and female applicants for employment opportunities.

Use only recruitment sources which state in writing that they practice equal opportunity. Advise all recruitment sources that qualified minority group members and women will be sought for consideration for all positions when vacancies occur.

Minority statistics are subject to audit by City of Chattanooga staff or other governmental agency.

The Contractor agrees to notify the City of Chattanooga of any claim or investigation by State or Federal agencies as to discrimination.

(Signature of Contractor)

(Title and Name of Construction Company)

(Date)

Requirements for Insurance Coverage

The Contractor shall not commence work under these Contract Documents until he has obtained all insurance required herein nor shall the Contractor allow any Subcontractor to commence work on his subcontract until similar insurance required of the Subcontractor has been obtained by the Subcontractor. Insurance shall be placed by the Contractor with one or more insurance carriers licensed to do business in the State of Tennessee. Each insurance policy shall be renewed ten (10) days before the expiration date of the policy.

Certificates of insurance shall be filed with the City prior to commencement of the work. These certificates shall contain a provision that coverage's afforded under the policies will not be changed or canceled unless at least fifteen (15) days' written notice has been given to the city. The Contract shall not be binding upon the city until the insurance coverage required herein has been obtained and certificates have been filed with the City.

Adequate insurance coverage shall be maintained by the Contractor at all times. Failure to maintain adequate coverage shall not relieve the Contractor of any responsibilities or obligations under these Contract Documents. In the event any insurance coverage is canceled or allowed to lapse, the Contractor will not be permitted to prosecute the work until adequate and satisfactory insurance has been obtained and certificates of insurance furnished to the City. Failure to keep insurance policies in effect will not be cause for any claims for extension of time under these Contract Documents.

All such policies shall be subject to approval by the City Attorney. Should the City Attorney at any time in his sole discretion determine that the insurance policies and certificate provided may not be sufficient to protect the interests of the City because of the insolvency of the insurance company or otherwise, the Contractor shall replace such policies with policies meeting his approval.

The Contractor shall procure and maintain at his own expense, during the Contract Time, insurance as hereinafter specified:

Workmen's Compensation Insurance that shall protect the Contractor against all claims under applicable state workmen's compensation laws shall be maintained. The Contractor shall also be protected against claims for injury, disease or death of employees which, for any reason, may not fall within the provisions of a workmen's compensation law. This policy shall also include an endorsement providing coverage in

all states in which work is performed. The Contractor shall require all the Subcontractors to provide similar Workmen's Compensation Insurance for all the Subcontractors' employees on the work unless such employees are covered by the protection afforded by the Contractor. The liability limits shall not be less than that required by statute.

General Public Liability and Property Damage Insurance that shall be written in comprehensive form and shall protect the Contractor against all claims arising from injuries including death, to members of the public or damage to property of others arising out of any act or omission of the Contractor or his agents, employees, or Subcontractors. In addition, this policy shall specifically insure the contractual liability assumed by the successful bidder to defend and indemnify the City of Chattanooga against such claims or suits.

To the extent that the work may require blasting, explosive conditions or underground operation, the comprehensive general public liability and property damage coverage shall contain no exclusion relative to blasting, explosion, collapse of buildings, or damage to underground property.

The comprehensive general public liability and property damage coverage shall also protect the Contractor against all claims resulting from damage to: Private driveways, walks, shrubbery and plantings; Public utility facilities; and U.S. Government monuments.

The liability limits shall not be less than:

Bodily Injury	\$ 500,000 each person \$1,000,000 each occurrence
Property Damage	\$ 250,000 each occurrence \$ 500,000 aggregate

The general public liability and property damage insurance shall carry an endorsement in form satisfactory to the City to the effect that the Contractor shall save harmless the City from any claims and damage whatsoever, including patent infringement. General public liability and property damage insurance shall be kept in force at all times during the course of the work until such time as the work covered by these Contract Documents has been completed and accepted by the City.

Comprehensive Motor Vehicle Liability and Property Damage Insurance that shall be written in comprehensive form and shall protect the Contractor against all claims for injuries to members of the public and damage to property of others arising from the use of motor vehicles, and shall cover operation on or off the site of all motor vehicles licensed for highway use, whether they are owned, non-owned, or hired.

The liability limits shall not be less than:

Bodily Injury	\$ 250,000 each person
	\$ 500,000 each occurrence
Property Damage	\$ 100,000 each occurrence

Affirmation and Signature

In submitting this proposal, I understand that The City reserves the right to reject any and all proposals.

The undersigned further agrees that this proposal is made in good faith and is not founded on, or in consequence of, any collusion, agreement or understanding between his or herself or any other interested party.

Business Name	Mailing Address
Business Phone Number	Fax/other Number
Printed name of first signatory	Title
Signature	Date
Printed name of second signatory	Title
Signature	Date